

Manage User Privileges

1 Introduction

Within each institution, at least one user is designated as the Admin Sponsored Research Officer/Business Officer/Administrative Officer (SRO/BO/AO). This user possesses special privileges, which allow them to perform the following actions:

- “Manage Institution Profile” – This privilege allows users to update institution information.
- “Manage Users” – This privilege allows users to manage the privileges of other registered users within the institution.
- “Submit to DOE” – This privilege allows users to submit various resources and documents to DOE, including revised budgets.

The purpose of this document is to provide step-by-step instructions for users to follow to Manage User privileges at the institution level.

2 Prerequisites

Before a user can Manage Users at the institution, the following criteria must be met:

- The user has an active, external PAMS account.
- The user has the “Manage Users” privilege.

3 Manage Users

Use the following steps to Manage Users' privileges at the institution level.

3.1 Managing Users from the Institution

1. Log in to your external PAMS account at (Figure 1): <https://pamspublic.science.energy.gov/webpamsepseexternal/login.aspx>.

Figure 1. PAMS External Login

2. Navigate to the Institutions tab (Figure 2).

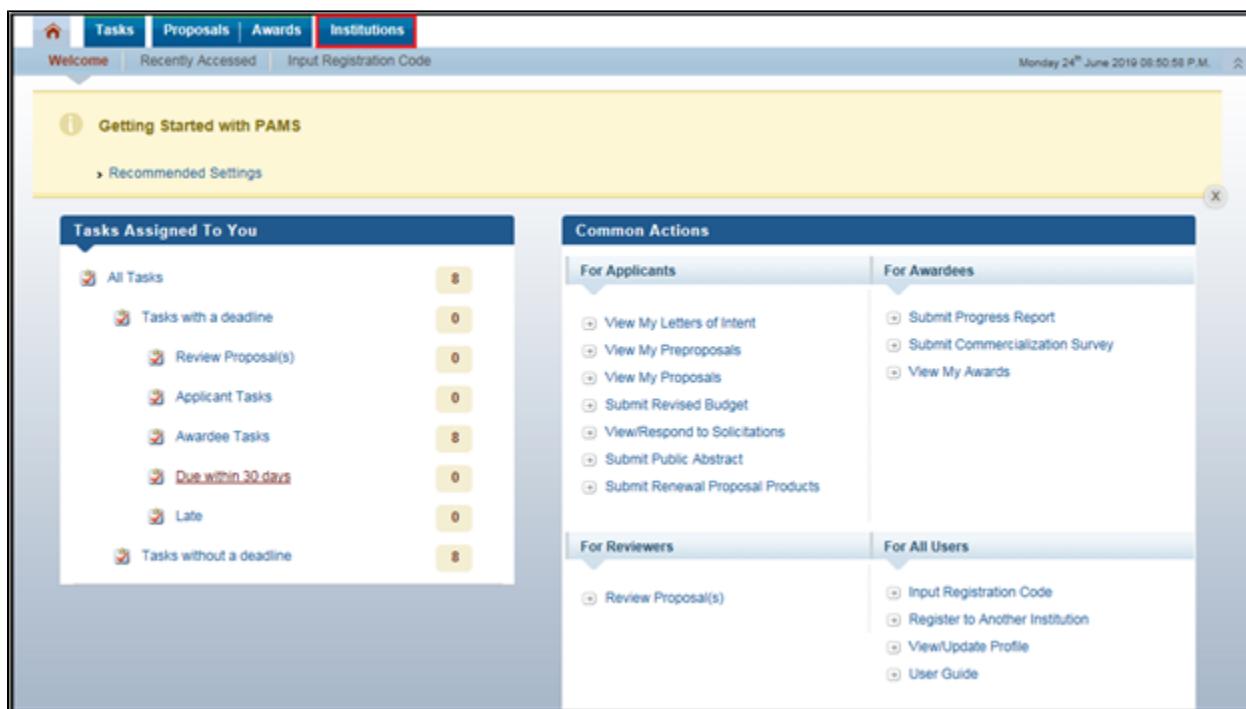


Figure 2. Home Page – Institutions Tab

3. PAMS will load the “Institutions – List” page, which lists all of the institutions you are associated with in PAMS. Browse the list or use the filters or advanced search above the grid to locate the proposal for which you would like to manage users. Once you have located the proposal, select **Manage Users** from the **Actions** menu in the Options column (Figure 3).

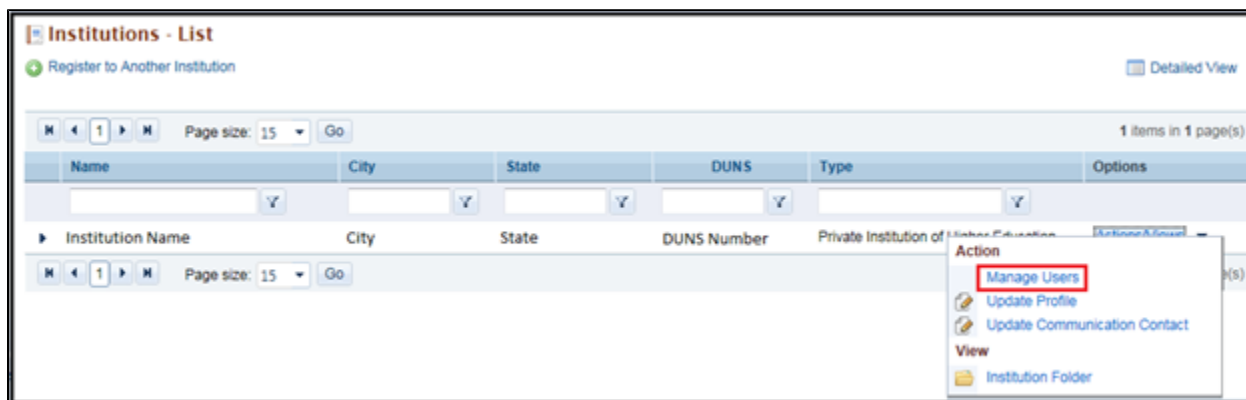


Figure 3. Institutions – List, Manage Users

4. PAMS will navigate you to the “Manage Users” page. There are five Manage Users options: **By Letter of Intent**, **By Preproposal**, **By Proposal**, **By Award**, and **By Users**. To search for and manage users for your institution, click the magnifying glass beside **By Users** (Figure 4).



To manage users **By Letter of Intent**, **By Preproposal**, **By Proposal**, or **By Award**, refer to *How To: Manage Peer Access Permissions (Preproposal, Letter of Intent (LOI), Proposal, Award)*.



Manage Users

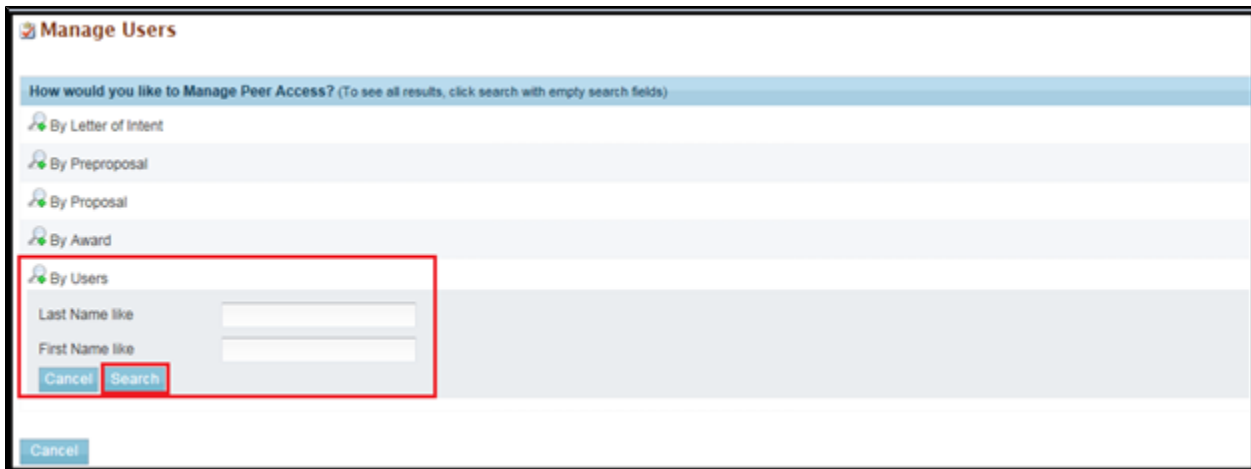
How would you like to Manage Peer Access? (To see all results, click search with empty search fields)

- By Letter of Intent
- By Preproposal
- By Proposal
- By Award
- By Users**

Cancel

Figure 4. Manage Users, By Users

5. PAMS will load search parameters under **By Users**. Enter Last Name (like) and/or First Name (like), and click **Search** to narrow your results **OR** click **Search** with no parameters to search all users registered to your institution (Figure 5).



Manage Users

How would you like to Manage Peer Access? (To see all results, click search with empty search fields)

- By Letter of Intent
- By Preproposal
- By Proposal
- By Award
- By Users**

Last Name like

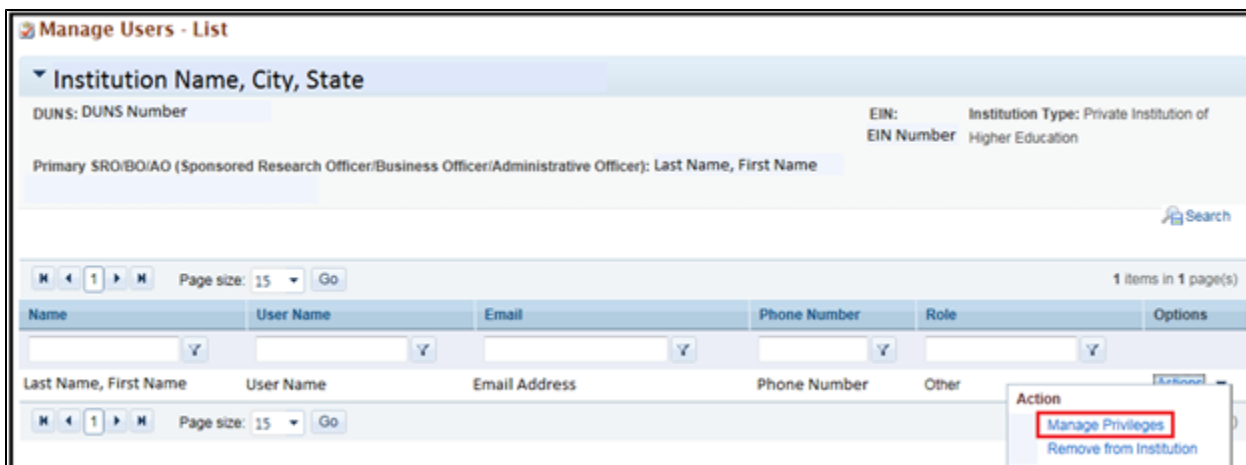
First Name like

Cancel Search

Cancel

Figure 5. Manage Users, By Users, Parameters

6. PAMS will navigate to the "Manage Users – List" page. Browse the list or use the filters or advanced search above the grid to locate the user for whom you would like to manage peer access. Once you have located the user, click **Manage Privileges** in the **Actions** menu in the Options column (Figure 6).



Manage Users - List

▼ Institution Name, City, State

DUNS: DUNS Number EIN: Institution Type: Private Institution of
EIN Number Higher Education

Primary SRO/BO/AO (Sponsored Research Officer/Business Officer/Administrative Officer): Last Name, First Name

Search

Page size: 15 Go 1 items in 1 page(s)

Name	User Name	Email	Phone Number	Role	Options
Last Name, First Name	User Name	Email Address	Phone Number	Other	Action Manage Privileges Remove from Institution

Page size: 15 Go

Figure 6. Manage Users – List

7. PAMS will navigate you to the "Manage User Privileges" page, which displays the user's current roles and privileges. Roles include: PI, SRO/BO/AO, and Other. Privileges include: Manage Institution Profile, Manage Users, and Submit to DOE. Select the checkbox for each role or privilege you would like to grant the user (Figure 7).

8. Once you have made your selections, click **Save and Continue** in the bottom right corner of the page.

The screenshot shows the 'Manage User Privileges' form. At the top, there are tabs for 'Tasks', 'Proposals', 'Awards', and 'Institutions'. Below the tabs, there is a breadcrumb trail: 'You are here: Home » Institutions » Browse » General [] » Manage Users'. The form is titled 'Manage User Privileges' and includes a dropdown for '[Institution Name, City, State]'. Below this, there are fields for 'DUNS: 000000000', 'EIN: 000000000', and 'Institution Type: Public/State Controlled Institution of Higher Education'. There is also a field for 'Primary SRO/BO/AO (Sponsored Research Officer/Business Officer/Administrative Officer): [LastName, FirstName]; [LastName, FirstName]; [LastName, FirstName]; [FirstName]'. The 'User Information' section has checkboxes for 'PI', 'SRO/BO/AO', and 'Other' roles, and checkboxes for 'Manage Institution Profile', 'Manage Users', and 'Submit to DOE'. A 'Cancel' button is at the bottom left, and a 'Save and Continue' button is at the bottom right, highlighted with a red box.

Figure 7. Manage User Privileges

9. PAMS will return you to the "Manage Users – List" page, and display a Success message confirming that the user's privileges have been updated successfully (Figure 8).

The screenshot shows the 'Manage Users - List' page. At the top, there is a green banner with a checkmark icon and the text 'Success: Successfully updated user privileges.'

Figure 8. Manage Users – Success

3.2 Manage Users – Remove from Institution

During the course of an award's lifecycle, the Admin SRO/BO/AO may need to remove a user from the institution entirely. Use the following steps to remove a user from an institution.

1. Refer to Section 3.1 Manage Users from the Institution, steps 1-6 above to navigate to the "Manage Users – List" page.
2. Browse the list or use the filters or advanced search above the grid to locate the user whom you would like to remove from the institution. Once you have located the user, click **Remove from Institution** in the **Actions** menu in the Options column (Figure 9).

The screenshot shows the 'Manage Users - List' page. At the top, there is a dropdown for '[Institution Name, City, State]'. Below this, there are fields for 'DUNS: DUNS Number', 'EIN: EIN Number', and 'Institution Type: Private Institution of Higher Education'. There is also a field for 'Primary SRO/BO/AO (Sponsored Research Officer/Business Officer/Administrative Officer): Last Name, First Name'. Below these fields is a 'Search' button. The table has columns for 'Name', 'User Name', 'Email', 'Phone Number', 'Role', and 'Options'. The 'Options' column has a dropdown menu with 'Action' selected, and 'Remove from Institution' is highlighted with a red box. There are also 'Page size: 15' and 'Go' buttons, and a 'Cancel' button at the bottom left.

Figure 9. Manage Users – List, Remove from Institution

3. PAMS will navigate you to the “Manage Users – Confirm Remove User From Institution” page. On this page, you have the option to enter comments pertaining to the user’s removal from the institution. To remove the user from the institution, click **Confirm** in the bottom right corner of the page (Figure 10).

Manage Users - Confirm Remove User From Institution

Confirmation:

Are you sure you want to remove Daniel Abercrombie (dabercro) from the Institution?

Institution Name, City, State

DUNS: DUNS Number

EIN: EIN Number

Institution Type: Private Institution of Higher Education

Primary SRO/BO/AO (Sponsored Research Officer/Business Officer/Administrative Officer): Last Name, First Name

Remove User From Institution

Comment:

Approximately 1/4 page (Max 500 Characters); 500 Characters left.

Cancel

Confirm

Figure 10. Manage Users – Confirm Remove Users From Institution

4. PAMS will navigate you to the “Manage Users – List” page, and display a Success message confirming that the user has been removed from the institution successfully (Figure 11).

Manage Users - List

Success:

Successfully removed user from the institution.

Figure 11. Manage Users – List, Success

Note

When removing users from your institution, keep in mind that Principal Investigators (PIs) on active awards should not be removed until an Award Modification Request is created to Change the PI on the Award.